



Office of Economic Development
City & County of Honolulu

2006
COUNTY PRODUCT ENRICHMENT PROGRAM
INFORMATION & APPLICATION PACKET

Office of Economic Development
Attn: Isaac Hokama
Honolulu Hale – Room 306
530 South King Street
Honolulu, HI 96813

List of Contents

Section/Exhibit

BACKGROUND & OVERVIEW	1
SPECIFICATIONS.....	2
APPLICATION INSTRUCTIONS & FORMS	3
• APPLICATION FORM	
• PROPOSAL OUTLINE	
• PROJECT BUDGET	
FINAL REPORT OF ACTUAL EXPENSES & INCOME	4
CPEP FINAL REPORT FORM	5
FREQUENTLY ASKED QUESTIONS	6
Workshop Survey Sheet	7
** to be filled and returned by the end of the meeting	

SECTION/EXHIBIT

1

Background & Overview

BACKGROUND AND OVERVIEW

Introduction

The Hawaii Tourism Authority's (HTA) Product Development Program was established to enhance Hawaii's tourism product offerings. The most recent strategic initiative for Tourism Product Enrichment and Diversification calls for the following strategy:

STRATEGY:

Diversify and enrich Hawaii's tourism product by developing new and enhancing existing community-based tourism events, experiences, attractions and projects related to the niches of agriculture, culture, education, health and wellness, nature and technology to complement Hawaii's traditional resort product and assist in overall economic diversification.

Objectives

The "Office of Economic Development City & County of Honolulu" is soliciting proposals on behalf of HTA's Product Development Program to develop new and enhance existing tourism events, experiences and programs that will:

- ✓ Provide a year-round calendar of events, activities and experiences, with special attention given to "shoulder" periods.
- ✓ Provide an equitable distribution of events, activities and experiences throughout the county.
- ✓ Support programs that preserve, perpetuate and/or promote Hawaii's host culture.
- ✓ Support the development of the six targeted niche market areas of agri tourism, cultural tourism, edu tourism, health and wellness tourism, eco tourism, and techno tourism.
- ✓ Provide a diverse range of "value-added" experiences for visitors.
- ✓ Provide information for visitors through marketing and promotional efforts.
- ✓ Provide venues for increased resident-visitor interaction.
- ✓ Support community-based tourism initiatives.
- ✓ Provide entrepreneurial opportunities for residents.
- ✓ Foster public-private sector partnerships.
- ✓ Support HTA's goal of increasing visitor expenditures and length of stay.
- ✓ Assist in the diversification of Hawaii's economy.

Definitions

Agri Tourism: Tourism related to experiencing and appreciating agricultural products, settings, and lifestyles.

Cultural Tourism: Tourism related to Hawaii's host and multi-ethnic cultures that provide residents and visitors with enriching experiences and insights into the history, customs, art and traditions of our islands.

Edu Tourism: Tourism related to formal and informal education and training in life-long learning experiences in Hawaii's unique natural and multi-cultural environment.

Health and Wellness Tourism: Tourism related to the burgeoning health and wellness industry, focusing on travel for the purpose of enhancing the wellness of the mind, body, and spirit of individuals, families and groups.

Eco Tourism: Tourism related to experiencing Hawaii's natural attractions, unique flora, fauna, and culture in a manner which is ecologically responsible, economically sustainable, and encourages the well-being of the local community, and is infused with the spirit of *aloha aina*.

Techno Tourism: Tourism related to travel for the purpose of utilizing Hawaii's science and technology state and federal assets as well as attending conferences and symposiums devoted to the enhancement of these resources.

SECTION/EXHIBIT 2

Specifications

SPECIFICATIONS

Funding

The HTA has budgeted a specific amount of funds for the County's Product Enrichment Program. The county reserves the right to use a portion of its product enrichment budget to accept or solicit proposals or negotiate for projects that the county believes will fulfill its product development strategy and objectives in line with the HTA's strategy and objectives.

All monies awarded under this RFP are subject to the availability and receipt by the City of funds from the HTA/State of Hawaii.

Proposal Conditions

1. **THERE IS A 1:1 MATCHING FUNDS REQUIREMENT TO THE AMOUNT OF FUNDS REQUESTED.**

Matching funds can be in the form of cash or a combination of cash and in-kind contributions. Matching funds shall not come from other State government sources, the Hawaii Visitors and Convention Bureau or its chapters.

If you are awarded funding, you will need to provide the City & County of Honolulu HTA-CPEP Administration with your proof of matching funds within thirty (30) days of your award notification.

2. Funds requested SHALL NOT be used for construction, capital improvements, and business or organizational start-up plans.
3. A completed application in the manner required in the attached Applicant Instructions must be submitted between August 18th - September 16th, 2005. This application must include:
 - (a) Complete **Application Form** (see attached).
 - (b) Detailed Description of the project in accordance with the attached **Proposal Outline** (Attachment A).
 - (c) Detailed budget for the project following the attached sample **Project Budget** (Attachment B).
 - (d) Organization's most recent financial statement certified as to its accuracy by an officer of the organization.
 - (e) Budget from the previous event/project, if applicable.
 - (f) A valid tax clearance. (Tax clearances are valid for 6 months for purposes of contract execution and for 60 days for final payment requests.)
 - (g) By-laws or other documentation to verify the person(s) who is authorized to sign legal documents on behalf of the organization.
4. This RFP is for projects occurring between January 1, 2006 to December 31, 2006 in the City & County of Honolulu.

5. The HTA's County Product Enrichment Program must also adhere to the following guidelines:
- (a) Award amounts should be limited to no more than \$100,000 per project to ensure support for multiple projects throughout the County.
 - (b) Projects must fall under one of the following niche market areas: agri tourism, cultural tourism, edu tourism, health and wellness tourism, eco tourism, or techno tourism.
 - (c) Special consideration will be given to projects occurring in traditionally slower visitor months.
 - (d) Special consideration will be given to projects occurring in rural communities of the county.
 - (e) Special consideration will be given to projects that support the perpetuation, preservation and/or promotion of Hawaii's host culture.
 - (f) Special consideration will be afforded to those projects that involve multiple industry participation, are community-based, and/or involve multiple partners.

TIMELINE

**1 ORIGINAL AND 5 COPIES OF YOUR PROPOSAL IS DUE,
ON OR BEFORE SEPTEMBER 16, 2005 AT 4:30 PM**
IN THE OFFICE OF ECONOMIC DEVELOPMENT
HONOLULU HALE, ROOM 306
530 SOUTH KING STREET
HONOLULU, HAWAII 96813.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

QUALIFICATIONS/EXPERIENCE (25%)	FINANCIAL ACCOUNTABILITY (25%)	PROPOSAL (50%)
<ul style="list-style-type: none"> • Depth and breadth of experience in performing similar work • Level of integrity, reliability, and credibility of the organization • Staff resources of contractor/sub-contractor including relevant expertise of individuals responsible for planning, developing and implementing proposed project or program 	<ul style="list-style-type: none"> • Financial Statement • Budget, including past performance, if applicable • Does the group have a good history of fulfilling requirements to the County or HTA for past grants in a timely manner? (if applicable) • 1:1 matching funds requirement* • HTA-CPEP Funds used to enhance a CPEP program not as the primary funding source. 	<ul style="list-style-type: none"> • Project feasibility • Ability to meet HTA’s and County’s product enrichment strategy and objectives relative to, but not limited to, timing, location, niche market, and visitor impact • Validity of project evaluation plan (Indicators) • Financial need • Project sustainability • Degree of community support • Is the event/program being held during a shoulder period? • Does the event promote the host culture or provide an educational element about the host culture? • Are there other similar events competing on the same schedule?

* *There is a 1:1 matching funds requirement to the amount of funds requested. Matching funds can be in the form of cash or a combination of cash and in-kind contributions. Matching funds shall not come from other state government sources, the Hawaii Visitors and Convention Bureau or its chapters.*

SECTION/EXHIBIT

3

Application Instructions & Forms

**HAWAII TOURISM AUTHORITY
COUNTY PRODUCT ENRICHMENT PROGRAM**

APPLICANT INSTRUCTIONS

All of the following items must be submitted as part of your proposal package on or before Friday, September 16, 2005 at 4:30 PM at the Office of Economic Development at Honolulu Hale, Room 306, 530 South King Street, for your proposal to be considered for funding.

1. Complete the attached **Application Form**.
2. Prepare a detailed description of your project in accordance with the attached outline (Attachment A).
3. Prepare a detailed budget for your project using the attached budget format. Be sure to identify all sources of funding in addition to the HTA product enrichment funds you are seeking (Attachment B).
4. Other required documents:
 - a. Organization's most recent annual financial statement certified as to its accuracy by an officer of the organization.
 - b. Budget for the previous event/project, if applicable.
 - c. A tax clearance is required at the time your proposal is submitted. If your proposal is selected, an updated tax clearance may be required if the submitted tax clearance has expired (tax clearances are valid six months) in order to execute the contract. Your failure to provide an acceptable tax clearance in a timely manner will delay the execution of your contract. We understand that it may require approximately two weeks to get a tax clearance.
 - d. By-laws or other documentation is also required at the time your proposal is submitted. This document is needed to verify the person(s) who is authorized to sign legal documents on behalf of the organization.
5. A Self-addressed stamped envelope (you will receive a confirmation within 10 working days that your proposal was received).
6. Your total proposal package shall include all of the documents listed in 1-5 above.

Failure to provide these documents in a manner described herein will provide a basis to reject your proposal as being non-responsive.

7. Please note that if your proposal is selected for funding and a contract/agreement is awarded, your proposal and contract/agreement become a public document, available for public inspection. Unless you identify any information that you deem to be proprietary, all information stated in your proposal will be made available for public inspection.

8. **SUBMIT AN ORIGINAL PLUS FIVE (5) COPIES OF YOUR PROPOSAL TO:**

Office of Economic Development
Attn: Isaac Hokama
Administrator, HTA -CPEP
Honolulu Hale – Room 306
530 South King Street
Honolulu, HI 96813
Phone: (808) 527-6090
Fax: 523-4242
e-mail: ihokama1@honolulu.gov



**HAWAII TOURISM AUTHORITY
CITY & COUNTY OF HONOLULU
COUNTY PRODUCT ENRICHMENT PROGRAM
APPLICATION FORM
2006**



APPLICANT INFORMATION:

Organization (Full Legal Name)

Street Address

Mailing Address

Phone

Fax

Federal Taxpayer ID No.

State Taxpayer ID No.

Organization is a (check one): For-profit entity Non-profit entity Government entity

PROGRAM/INITIATIVE INFORMATION:

Program/Initiative Title

Brief description of your project (*maximum 50 words*):

Project Start & End Dates _____ Amount Requested _____

Contact Person _____

Name

Title

Phone: _____ Fax: _____ Email: _____

This proposal is submitted for consideration under the HTA County Product Enrichment Program for the following niche market area (check only one):

- | | |
|--|--|
| <input type="checkbox"/> Agritourism (Agriculture) | <input type="checkbox"/> Health & Wellness Tourism |
| <input type="checkbox"/> Cultural Tourism | <input type="checkbox"/> Techno Tourism (Technology) |
| <input type="checkbox"/> Eco Tourism (Nature) | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Edu Tourism (Education) | |

CERTIFICATION:

The information contained in this application is true and correct to the best of my knowledge and belief. This document has been duly authorized by the governing body of the applicant organization.

Signature of Authorized Official

Date

Print Name

Title

**HAWAII TOURISM AUTHORITY
COUNTY PRODUCT ENRICHMENT PROGRAM
2005**

PROPOSAL OUTLINE

GENERAL BACKGROUND (*Maximum One Page*)

1. **DESCRIPTION OF ORGANIZATION:** Provide a brief history of the establishment, development, and accomplishments of the organization.
2. **QUALIFICATIONS AND EXPERTISE:** Describe the qualifications and expertise of the individuals responsible for implementing the project.

PROJECT DESCRIPTION/HISTORY (*Maximum Four Pages*)

3. **DESCRIPTION OF PROPOSED PROJECT:** Provide an overview of the proposed project to be carried out. Provide a work plan describing the activities/tasks you will undertake to implement the project.
4. **GOALS AND OBJECTIVES:** Describe the goals and objectives for the project. What will the project accomplish? How will the project meet the objectives of the Program? How will this project contribute positively to visitor expenditures in Hawaii?
5. **TARGET AUDIENCES:** Describe your target audience(s). How will you reach your targeted audience? Include a schedule of all promotional and advertising activities, if applicable.
6. **COMMUNITY SUPPORT AND INVOLVEMENT:** What is the need in the community for this project? Is there community support? What is the value to the community? Identify all entities that support or are directly involved in this project.
7. **PROJECT SUSTAINABILITY:** Describe how the project will be sustained on an ongoing basis.

PROJECT IMPACT (*Maximum One Page*)

8. **BENEFITS AND OUTCOMES:** What do you expect to be the benefits and outcomes of the project? Explain in detail.

9. INDICATORS: Specify the indicators you will use to evaluate your project/initiative, and identify the target(s) you hope to achieve.

<u>INDICATOR 1/</u>	<u>2003 ACTUAL</u>	<u>2004 ACTUAL OR ESTIMATE</u>	<u>2005 ESTIMATE/ PROJECTION</u>	<u>2006 ESTIMATE/ PROJECTION</u>
Total number of attendees (including participants) to project:				
Number of attendees/participants from off-island:				
Number of attendees/participants from out-of-state:				
Number of first-time versus repeat visitors:				
Number of responses and inquiries resulting from advertising and promotional activities:				
Number of responses and inquiries resulting from a webpage, if applicable:				
Economic impact of the project on-site (include formula used to calculate impact):				
Economic impact of the project statewide (include formula used to calculate impact):				
Number of impressions categorized by type of media:				
Estimated dollar value of media coverage categorized by type of media (if applicable):				
Other Indicator (please specify):				
Other Indicator (please specify):				

ATTACHMENT B

PROJECT BUDGET

	CASH		IN-KIND	TOTAL
	HTA/County	Other		
Expenses				
<i>Marketing</i>				
<i>Operating</i>				
<i>Administrative</i>				
TOTAL EXPENSES				

Income		CASH	IN-KIND	TOTAL
HTA County Product Enrichment				
(Name sponsor)				
Organization's Contribution				
TOTAL INCOME				

Marketing Expenses: This category includes advertising; promotional activities and/or items such as posters, flyers, brochures, collateral materials, public relations, and website development or enhancement.

Operating Expenses: This category includes program operating costs such as equipment rental (e.g., tents or sound equipment), entertainment, travel, security, office supplies, postage, etc. Category could also include research and development costs (e.g., consultant services). Generally, HTA County Product Enrichment funds are not approved to support general operating expenses.

Administrative Expenses: This category includes salaries/wages, taxes/benefits, and administrative fees. The targeted percentage for administrative expenses should not exceed 25% of the total amount requested from the HTA County Product Enrichment Program.

SECTION/EXHIBIT

4

Final Report of
Actual Expenses & Income

FINAL REPORT OF ACTUAL EXPENSES AND INCOME
CONTRACT NUMBER: _____

	CASH		IN-KIND	TOTAL
	HTA	Other		
Expenses				
<i>Marketing</i>				
<i>Operating</i>				
<i>Administrative</i>				
TOTAL EXPENSES				

Income		CASH	IN-KIND	TOTAL
HTA County Product Enrichment				
(Name sponsor)				
Organization's Contribution				
TOTAL INCOME				

I hereby certify that all financial statements represented in this final report to the City & County of Honolulu relating to Contract/Agreement Number _____ (Agreement), are accurate and that funds allocated through the HTA County Product Enrichment Program under this Agreement have been expended in accordance with the provisions set forth in this Agreement, including the budget that was made a part of said Agreement.

 Organization/Contractor

 Signature

 Project Title

 Print Name

 Date Signed

 Title

SECTION/EXHIBIT

5

Final Report Form

*Notice: If you have been awarded HTA-CPEP Funds and your final reports have not been completed and submitted to the HTA-CPEP Administrator as required by the terms and conditions of the grant contract, you will not be eligible for HTA-CPEP 2007 funding.



Hawaii Tourism Authority

COUNTY PRODUCT ENRICHMENT PROGRAM FINAL REPORT FORM

GENERAL INFORMATION

Organization: _____	Contract/ Agreement No.: _____
Contact: _____	Title: _____
Project/ Program Title: _____	Project/ Program Date(s): _____
Agreement Effective Date: _____	Agreement End Date: _____
Phone and/or Email: _____	Amount Awarded: _____

Project/Program Description (include goals and objectives):

- 1) Describe how HTA's County Product Enrichment Program's funds were used for the project/program.

- 2) Complete the table below and provide a narrative description to support the data in the table. Include an explanation of why the targets were or were not attained. (Attach separate sheet as necessary.) Do not use any multipliers to calculate economic impact.

<u>INDICATOR 1/</u>	<u>2005 ACTUAL</u>	<u>2006 ACTUAL</u>	<u>2007 ESTIMATE/ PROJECTION</u>
Total number of attendees (including participants) to project:			
Number of attendees/participants from off-island:			
Number of attendees/participants from out-of-state:			
Number of first-time versus repeat visitors:			
Number of responses and inquiries resulting from advertising and promotional activities:			
Number of responses and inquiries resulting from a webpage, if applicable:			
Economic impact of the project on-site (include formula used to calculate impact):			
Economic impact of the project statewide (include formula used to calculate impact):			
Number of impressions categorized by type of media:			
Estimated dollar value of media coverage categorized by type of media (if applicable):			
Other Indicator (please specify):			

Description and Explanation:

3) Describe how the project met HTA's and County's objectives and the organization's objectives as well.

4) Describe how this project/program could be improved.

5) Describe your next steps for this project/program.

Additional Comments:

Submitted by: _____
(Name) (Title)

(Phone) (Fax) (Date)

For Staff Use Only

Date Received by County Office: _____

Final Report Accepted by: _____
(County Product Enrichment (Date)
Program Staff's Initial)

(County Product Enrichment (Date)
Program Coordinator's Initial)

(HTA Product Development (Date)
Program's Initial)

SECTION/EXHIBIT 6

Frequently Asked Questions

FREQUENTLY ASKED QUESTIONS ABOUT THE COUNTY PRODUCT ENRICHMENT PROGRAM

1. Who can apply?

Not-for-profit organization that meets the strategy, objectives, proposal conditions and applicant instructions of the HTA's County Product Enrichment Program as outlined in the County Product Enrichment Information and Application Packet for any project to be held in the City & County of Honolulu.

2. What types of projects will be considered?

HTA's Product Enrichment Program has funded many different types of projects—from one-day events to ongoing programs. All projects and programs will be considered as long as they meet the objectives of the Product Enrichment Program and are within the respective niche market areas of agri tourism, cultural tourism, edu tourism, health and wellness tourism, eco tourism or techno tourism. Programs must be initiated between January 1, 2006 and December 31, 2006.

Capital improvement projects, infrastructure, and business or organizational start-up plans will *not* be considered. Projects relating to other than tourism product enrichment activities will *not* be considered. For these purposes, a "tourism product" is defined as consisting of all elements – physical, experiential and emotional – that contribute to a destination's experience. Not included in this definition are tangible, manufactured products such as, but not limited to, videotapes, souvenirs or books.

3. How much money is available for this County Product Enrichment RFP?

The HTA Product Development Program has allocated \$500,000 to the County Product Enrichment Program. However, it should be expressly understood that the actual amount allocated for this RFP is solely dependent on the quality of the proposals received. The County and HTA reserves the right to not utilize the entire amount of funds allocated to this RFP. Additionally, should TAT revenues not match budgeted projections, the HTA and County reserves the right to re-allocate this budgeted amount.

4. Is there a limit to the amount of funding that can be requested in each proposal?

One of the objectives of this program is to ensure support for many projects to be held throughout the County. Therefore, award amounts should be limited to no more than \$100,000 per project.

5. Can multiple proposals be submitted?

Yes. Multiple proposals will be accepted and considered independent of each other. If multiple proposals meet the established criteria and adequate funds are available, they may be funded.

6. What is the timeline for this process?

Deadline to submit your proposal is September 16, 2005. Appropriate members of the County Product Enrichment Oversight Committee will review proposals submitted.

Evaluations and recommendations will be made to the full Committee for final approval. Notification letters should be mailed out by October 15, 2005.

7. *Will another RFP be issued later in the year?*

This RFP covers programs from January 1, 2006 to December 31, 2006. The county representative may reserve a portion of the RFP funds to be used as new opportunities arise throughout the year. Funding for projects will be contingent upon the ability of the applicant to meet the criteria and objectives of the product enrichment program, and on the availability of funding.

8. *What is considered “in-kind” contributions?*

Any contribution to the project other than cash is considered “in-kind”. This would include, but not be limited to, volunteer hours, supplies, or services contributed to the project. A reasonable dollar value must be attached to the in-kind contribution.

9. *What type of proof of matching funds is acceptable?*

Acceptable proof includes, but is not limited to, a letter of commitment, copy of a check, receipts of deposit, bank statement, or a copy of an agreement between the contractor and another sponsor. A list of sponsors and/or in-kind contributions is not acceptable proof. Back-up documentation is required for contract execution.

10. *How are payment schedules determined? What documentation is required for payment on the contract to be made?*

The county representative is required to retain a portion of the approved funding for final payment to be made once the agreement has been fulfilled.

Other payments of the payment schedule are negotiable. For the payments to be processed, contractor must submit an original and signed invoice, and all deliverables required for the payment to be processed per the executed contract. For the final payment, additional deliverables include a final report (see Sample Final Report Form), a final financial report (see Sample Final Financial Report Form), and a current tax clearance certificate issued no sooner than 60 days prior to request for payment.



**Mayor's Office of Economic Development
HTA-CPEP Administration**

Proposal Receipt Form

Name of Proposal: _____

In Person Delivery

Date Delivered: _____

Person Delivering the Proposal: _____
Name & Phone Number

Person Receiving the Proposal: _____
Name & Phone Number

Time Delivered: _____
Time Stamp

Delivery by Mail

Date Received: _____
Time Stamp

Person Receiving the Proposal: _____
Name & Phone Number

Receipt sent to: _____
Name & Address